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### 3.5 ALLOCATION FUNCTIONS

Allocations are the *planned* cargo and passenger loads for carriers. These allocations consist of the assignment of OPLAN requirements against individual carriers with all or a part of the requirement's cargo and passenger quantities being placed on the carrier.

**NOTE:** S&M works only with the ULN from an OPLAN TPFDD. This differs from the previous functionality of JOPES in which nonunit cargo requirements, using Cargo Increment Numbers (CIN), and nonunit passenger requirements, using Personnel Increment Numbers (PIN), could also be allocated/manifested.

Allocations are related to the planned itinerary of carriers, as opposed to "manifests" which are the actual loads that are being moved or were moved on a carrier's actual or reported itinerary. (See section 3.6 for Manifest Functions).

Allocations may be entered into S&M automatic from external systems such as the GTN or may be entered manually by users directly into the system. S&M provides the capability for a user to manually allocate requirements to carriers and to review and modify those allocations.

In manually adding allocations within S&M, two basic approaches may be used:

- 1) The standard methodology is to allocate requirements individually to a carrier one at a time. In S&M this is accomplished through the ADD/REVIEW, MODIFY ALLOCATIONS function. You will identify or select a carrier and the onload and offload routing, and then enter ULNs and quantities. This function also allows you to review the requirements already allocated to a carrier and to modify them if necessary.
- 2) A second approach is to retrieve a group of requirements for display, based on criteria that you specify, and to select from this group those requirements that are to be allocated. This is accomplished through the ADD GROUP ALLOCATIONS function. In this function you have the capability to accept quantities as they are or to tailor them if necessary.

### BUSINESS RULES

1. Carriers must support the OPLAN whose requirements are being allocated (See section 3.4.3 Add, Review, or Modify Supported OPLAN).
2. The user must have permissions to the OPLAN and proper functional permissions to add or modify allocations.
3. Requirements may be allocated to a carrier when the requirement routing is different from the carrier's itinerary.

4. Requirements may be allocated in quantities greater than the amounts listed specified in the TPFDD. The system will provide a warning but will not prevent the overallocation.
5. Carriers may be allocated to exceed their capacities. The system will provide a warning but will not prevent the user from exceeding the carrier capacity.
6. Cargo allocations on air and land carriers are accomplished in STON and the cargo capacities only reflect STONs.
7. Cargo allocations on sea carriers may be in any of three types: MTON, SQFT, or MBBL quantities.

## OVERALLOCATIONS AND OVERLOADS

S&M/CS permits a user to overallocate requirements to carriers and/or to exceed the stated maximum capacity of carriers.

**Overallocation:** An overallocation state occurs when a specific requirement is assigned to one or more carriers and the total of the quantities allocated exceeds any of the amounts listed in the TPFDD for that requirement.

**NOTE:** Overallocated and overmanifested are separate but synonymous terms that apply to whichever function is being done. A requirement may be overallocated but not overmanifested, or the reverse may be true.

A requirement is considered to be overallocated when any of the following conditions are met:

1. The number of passengers allocated exceeds the number of personnel requiring transport for the requirement.
2. The allocated amount of any cargo quantity type (STONs, MTONs, SQFT, or MBBLs) exceeds the comparable TPFDD quantities for the requirement.

**Exceeding Carrier Capacity:** A carrier overload occurs when the total amount of passengers or cargo placed on the carrier exceeds the listed maximum capacity (or maximum ACL for air carriers). For a sea carrier, if any one of the three cargo capacity types (MTONs, SQFT, or MBBLs) is exceeded, the carrier is considered to have had its capacity exceeded.

The system provides several methods to alert a user that a requirement is overallocated or if a carrier capacity has been exceeded. These methods include showing the quantities, screen highlights, and warning messages.

**Requirement Overallocation:****Add Group Allocation:**

1. When the list of requirements is first displayed, the quantities of passengers and cargo shown on the screen reflect the amounts remaining to be allocated for that movement leg. A negative figure indicates that the requirement is already overallocated for that category (PAX or cargo).
2. When you accept a requirement and adjust quantities that result in an over situation, a warning message is displayed at the bottom of the screen, "Requirements Overallocated", and the overallocated field is highlighted in reverse image. The field remains as long as the overallocated condition remains. If quantities are adjusted downward and totals return to the TPFDD requirement level, the highlight will disappear.
3. When you transmit the screen to commit the allocation to the database with any requirement over its limit, the system provides a warning message as a pop-up advising you "Requirement Overallocated...Want to continue" or press F6 to allow the process to continue or F9 to stop the process and return to the screen.

**Add, Review, or Modify Allocations:**

1. When you add a requirement to the list, the amount remaining to be allocated automatically is displayed, and you can adjust the figures. If you change the amounts to place the requirement into an over condition, a warning message appears at the bottom of the screen, Requirements Overallocated, and the overallocated field is highlighted in a reverse image. That highlight remains as long as the condition remains. If quantities are adjusted downward and totals return to the TPFDD requirement level, the highlight will disappear.
2. You can use the Act field in the display to find out the total status of a particular requirement across all carriers that the requirement is allocated on. Enter a dollar sign, \$, in the action field, and press TAB. A message will be displayed at the bottom of the screen that indicates the total allocation status of the requirement on that line.
3. When you transmit the screen to commit the allocation to the database with a requirement over its limit, the system provides a warning message as a popup advising you, "Requirement Overallocated...Want to continue." Press F6 to allow the process to continue or F9 to stop the process and return to the screen.

**Exceeding Carrier Capacity:**

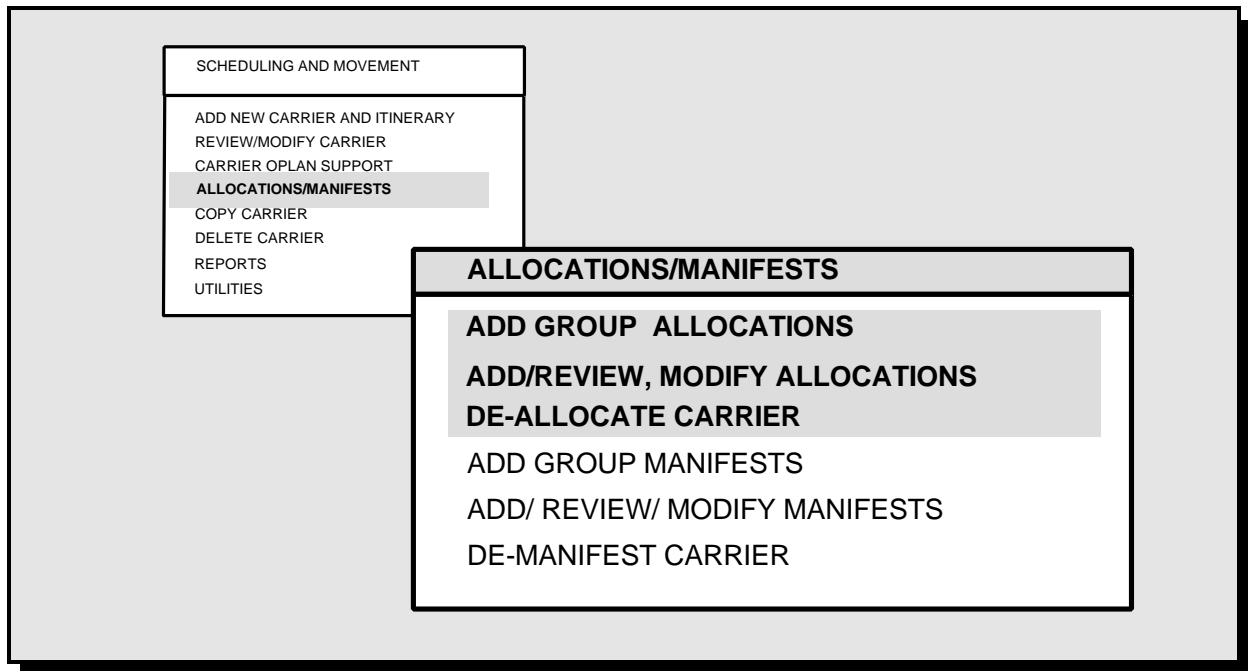
1. On all allocation screens, the carrier's capacity is displayed on the screen along with the total allocated. As requirements are accepted or added to the carrier, the total allocated is dynamically updated so the user can always see the current quantities on the carrier. Whenever a capacity is exceeded, the overloaded field is highlighted in reverse image. The

highlight remains on the screen as long as the carrier is overloaded. If a user changes an allocation to reduce the amount below the capacity threshold, the highlight will disappear.

2. When you add a requirement that causes a carrier to be overloaded, a warning message appears at the bottom of the screen, "Carrier Capacity Exceeded." This message appears only the first time you cause the carrier to be overloaded and will not be displayed again as long as you are working in the function and the status remains. However, if you reduce the carrier load below the capacity and subsequently overload the carrier again, the message will reappear.
3. When you transmit the screen to commit the allocation to the database with the carrier overloaded, the system provides a warning message as a pop-up advising you, "Carrier Capacity Exceeded...Want to continue." Press F6 to allow the process to continue or F9 to stop the process and return to the screen.

### TO SELECT THIS FUNCTION:

**USING THE MENU:** From the basic menu, select ALLOCATIONS/MANIFESTS with either your mouse or keyboard. You will then be presented a secondary cascaded menu. Select the allocation function that you want to use.



*Figure 3-37. Allocation/Manifest Menu*

ADD GROUP ALLOCATIONS	See Para 3.5.1
ADD, REVIEW, MODIFY ALLOCATIONS	See para 3.5.2
DE-ALLOCATE CARRIER	See Para 3.5.3

**USING RAPID NAVIGATION:** Type one of the following four digit RN codes on the Command Line to proceed directly to the add carrier function you specify:

<b>AGAL</b>	ADD GROUP ALLOCATIONS
<b>ARMA</b>	ADD/REVIEW, MODIFY ALLOCATIONS
<b>DALC</b>	DE-ALLOCATE CARRIER

### 3.5.1 Add Group Allocations

The ADD GROUP ALLOCATIONS capability provides you the capability to quickly allocate large numbers of requirements from a list that is retrieved based on criteria that you specify.

The basic process is as follows:

#### 1. Qualify carrier and requirements retrievals.

Identify a specific carrier or specify criteria that will allow the system to retrieve and display a list of carriers from which you can select.

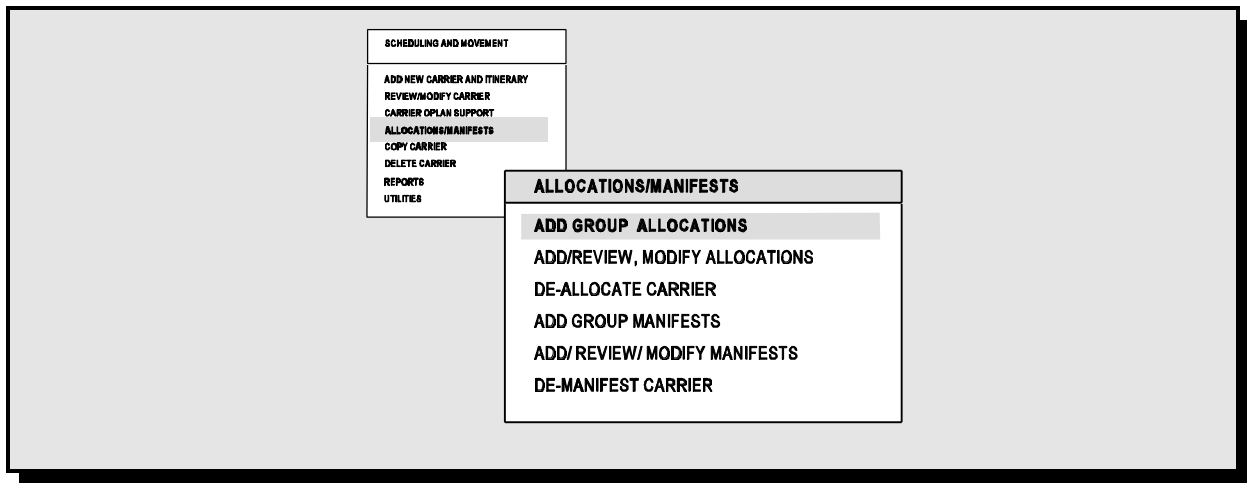
Specify criteria that will allow the system to retrieve and display requirements, meeting that criteria that you can mark for allocation.

**2. Select carriers.** If you specified carrier criteria (i.e., did not identify a specific carrier) the system will present you a list of carriers meeting that criteria. This is the same display used in REVIEW/MODIFY CARRIER function. You then choose on which carriers you want to use for the allocations. If you already identified a specific carrier, you will bypass this list.

**3. Allocate to carriers.** For each carrier you selected, in turn, the system will present you an add allocation screen that lists basic carrier information and displays in a scroll region a list of all the requirements that meet your original qualifying criteria. From this list you may select as many of the requirements as you want, tailor the individual requirements if necessary, and transmit the screen. On transmission, the database will be updated and allocation transactions completed. You continue through these screens until all carriers that you selected have been allocated or until you end the process.

### TO SELECT THIS FUNCTION:

**USING THE MENU:** From the basic menu, select ALLOCATIONS/MANIFESTS with either your mouse or keyboard. You will be presented a secondary cascaded menu. Select the allocation function that you want to use.



*Figure 3-38. Add Group Allocation Menu*

**USING RAPID NAVIGATION.** On the Command Line screen, enter **AGAL** to proceed directly to the ADD GROUP ALLOCATIONS qualification screen.

**3.5.1.1 Add Group Allocations Qualification.** The first screen you are presented in the ADD GROUP ALLOCATION function is a qualification screen that you use to define a series of criteria to retrieve both a list of carriers and a list of candidate requirements to be allocated to one or more carriers.



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*Figure 3-39. Add Group Allocations Qualification*

## **USER INPUT**

**CARRIER INFORMATION.** You can first identify a single carrier on which to allocate requirements. Otherwise, you can elect to retrieve a list of carriers based on carrier source, supported OPLAN, location, or date range.

- |                |  |
|----------------|--|
| <b>CARRIER</b> | Enter a Carrier ID if you want to allocate against (only one carrier) but do not want to retrieve a list of carrier to select from. It must be a valid Carrier ID. The system will prompt you if the carrier is not in the database. |
| <b>SOURCE</b>  | Source is used to retrieve a list of carriers based on its source (AMC, MTMC, MSC or Organic). Select the toggle for those sources you want to retrieve.   |
| <b>PROVORG</b> | This is used only if the carrier source is Organic, otherwise it is not an active field. If you selected Organic as a source you may limit the retrieval to a  |



specific providing organization's carriers. Enter a valid PROVORG code [Use the field help to see or select a code.]

## **SERVICE**

Service is used only if the carrier source is Organic, otherwise it is not an active field. If you selected organic as a source you may limit the retrieval to a specific service's carriers. Enter a valid service code. [Use the field help to see or select a code.]

**ONLOAD-OFFLOAD.** Enter an onload and an offload location code using the format shown on the screen. If you identified a single specific carrier, the location must be in that carrier's itinerary. If you are retrieving a group of carriers, this entry is used to limit the list to carriers with this onload location in their itinerary. This field is also used as a criterion to qualify the list of requirements to those requirements with these locations as part of the preferred movement routing (e.g., origin, POE, POD, or intermediate location). These are mandatory entries.

**? HINT:** There are two types of field help on these two onload and offload location fields depending upon whether you identified a single carrier or are retrieving a list of carriers:

If you entered a single carrier. Press F1 while the focus is on one of these fields. You will see a pop-up with that carrier's itinerary locations listed in order. On this pop-up you may select the onload and offload locations that you want to work with, and, when you exit the pop-up, your selections will be displayed in the fields.

If you are qualifying for a list of carriers. Press F1 while the focus is on one of these fields. You will see the GEOLOC search pop-up displayed.

## **OPLAN**

Enter a PID to be used for requirements selection and to limit the retrieval to carriers that support this OPLAN. This is a mandatory entry and you must have permissions to the plan. [Use field level help to see the OPLAN search pop-up.]

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*Figure 3-40. Onload/Offload Help/Selection Screen*

**DATES (FROM \_\_\_\_ TO \_\_\_\_).** [The first set of date fields!]. Enter a "from" and "to" date range to limit the list of carriers to those carriers that have a portion of their planned itineraries within this range. Use the format shown on the screen. You may also only enter one or the other to set only one end of the date range.

**REQUIREMENTS INFORMATION.** You now can identify additional criteria to qualify the requirements retrieval. All the following are optional fields.

**NOTE:** If you do not enter any more criteria, the system will retrieve all ULNs for the OPLAN listed above that have the two locations shown above in their preferred movement routing in that sequence of locations.

**LEG CODE** Enter a leg code (e.g., G is POE-POD.) [Use the field level help on this field to see all leg codes.] This will be used in conjunction with the location codes to limit the retrieved requirements to those that match the location only for the leg you enter here.

**REQUIREMENTS ROUTING ONLOAD-OFFLOAD.** Enter one or both locations, in the format shown on the screen, to retrieve requirements with a routing location different from the carrier's itinerary shown above.

**? HINT:** This has a wild card feature:

1. Use one field as a baseline and enter a location code or leave it blank. If left blank the system will use the comparable location code from the carrier itinerary that you entered above.
2. Place an asterisk in the other field (you cannot put an asterisk in both fields.)
3. Identify a leg code.

When you transmit the system will retrieve requirements whose movement routing leg (as indicated by the leg code) has the baseline location and any other location in the routing. For example, enter a leg code of G to indicate POE-POD, a location code of WXYZ in the Requirements Routing Offload field and an asterisk in the Requirements Routing Onload field. The system will retrieve requirements whose POD is WXYZ regardless of the POE.

**ALLOCATION STATUS SELECTION.** This row shows four categories of allocation:

- Overallocated
- Fully Allocated
- Partially Allocated
- Not Allocated.

Select the toggles adjacent to those categories that should be applied to the retrieved requirements. The system will retrieve and display requirements that meet that criteria. When the screen first appears, the Partially Allocated and Not Allocated categories are automatically selected. You may select or deselect any of these categories. If you choose all the selections or leave all the selections blank, the system will retrieve all requirements that meet any other qualifiers, regardless of the allocation status.

<b>SERVICE</b>	Enter a service code to retrieve only requirements of that service. [Use field level help if you want to see Service codes and make a selection.]
<b>PROVORG</b>	Enter a PROVORG code to retrieve only requirements of that PROVORG. [Use the field level help to see PROVORG codes and make a selection.]
<b>FMID</b>	Enter a Force Module (FM) ID to retrieve only requirements that are part of that FM.
<b>UIC</b>	Enter a UIC to retrieve only requirements with that UIC.

**ULN.** Enter a ULN of a requirement to limit the retrieval to the specific ULNs.

**RLD/ALD/EAD/LAD/RDD.** Select any of these toggles to limit the requirements retrieved to those requirements with the specified date(s) within the date range you designate. If you select one of these, you must then also specify a date range in the adjacent fields.

- RLD Ready to Load Date
- ALD Available to Load Date
- EAD Earliest Arrival Date
- LAD Latest Arrival Date
- RDD Required Delivery Date.

**DATES FROM/TO.** Enter a "from" date and a "to" date, using relative (i.e., C-date) format, that will be used to retrieve requirements whose RLD, ALD, EAD, LAD or RDD (as previously identified) fall within that range.

**MAXIMUM NUMBER OF REQUIREMENTS TO RETRIEVE.** This limits the number of requirements to be retrieved. Enter a number and the system will retrieve only that number of requirements (based on all other selection criteria) selected and sorted by LAD.

**? HINT:** The maximum number limitation is useful to speed up the retrieval if all other criteria may still leave a large number of requirements. For example, if you only qualify on OPLAN and the location field and set the maximum number at "10", you will retrieve the first 10 requirements for that OPLAN and those locations, based on the LAD.

Transmit the screen by pressing your ENTER key or using the mouse on the TRANSMT button on the screen. When you transmit the screen, the system will retrieve a list of carriers (if you did not enter a single Carrier ID at the top of the screen). The Review/Select Carriers screen will appear from which you can choose one or more carriers to work with.

Then the screen will display the appropriate Group Allocation screen for the selected carriers on which the list of requirements will be displayed. From this you can select requirements to be allocated.

**3.5.1.2 Review/Select Carriers.** This screen is presented when you only entered carrier criteria rather than a single carrier on the previous screen. See section 3.4.2.2 for a description of the screen and data. This screen will display a list of all carriers that meet the criteria you specified. From this list, select those carriers that you want to use for this allocation activity.

## SELECTING CARRIERS

You have the option to choose any or all the carriers on this list. If you want to select one or more carriers, toggle on the View Detail selection adjacent to the carrier(s) you want to review.

You have an option to choose all the carriers on the list at one time. Select the toggle at the bottom of the screen adjacent to Select All Listed Carriers. When selected, each of the View Detail toggles adjacent to the individual carriers will be activated.

You may also add individual carriers to this list that were not part of the initial retrieval. To do this, enter a valid Carrier ID in the Additional Carrier field at the bottom of the screen. The system will add this carrier to the end of the display. The carrier list will also be repositioned with that new carrier at the top of the scroll region with its View Detail toggle turned on.

**? HINT:** You can also use the Additional Carrier field to find a carrier on the list. When you enter a Carrier ID that is already on the list, that carrier is automatically displayed at the top of the scroll region. This is a useful technique if you have a particularly long list of carriers but do already know specific Carrier IDs that are of interest to you.

## USER INPUT

**VIEW DETAIL** Select the toggle adjacent to the carrier(s) to be displayed.

**SELECT ALL LISTED CARRIERS.** Toggle this selection to select all the carriers on the list. When you select this toggle, all the selected toggles in the list will become active. You can individually deselect specific carriers if you wish.

**ADDITIONAL CARRIER.** Enter a Carrier ID in this field and press the TAB key to enter a carrier onto the list that was not originally selected by your retrieval criteria. The system will place the carrier in the list and automatically activate the select toggle for that carrier.

**3.5.1.3 Add Group Requirement Allocations.** One of the Add Group Requirement Allocations screens is presented to you either after you transmit the Add Group Allocations qualification screen with a single Carrier ID entered or after you leave the Review/Select Carriers screen with one or more carriers selected. This screen displays carrier information for the single carrier you identified or for the first carrier selected from the carrier list. It contains a list of all requirements that met your qualification criteria from which you can select one or more requirements to be allocated to the carrier. You use the ACCEPT toggle to indicate that you want to allocate this requirement. You can adjust the quantities. The allocation is committed to the database only when you transmit the screen.



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*Figure 3-41. Add Group Requirement Allocations – Air*

All Add Group Requirement Allocations screens are structured similarly. The upper two-thirds of the screen contains basic nonmodifiable carrier information. The screens differ in this area by mode of carrier, because the information for each mode has some differences. The lower portion of the screen is a scroll region where the requirements information is displayed. This section of the screen is identical across all three modes, except for the cargo quantity fields.

Based on the mode of the carrier being reviewed, S&M will present the appropriate screen for the mode of carrier that you identified. The following screens are used in this function:

Air	SM-P02-A	Figure 3-41
Land	SM-P02-L	Figure 3-42
Sea	SM-P02-S	Figure 3-42a

The following carrier information fields are displayed only and similar to other screens in S&M:

<b>CARRIER</b>	Carrier unique identification.
<b>SHIP NAME</b>	The name of the ship.
<b>IRCS</b>	The International Radio Call Sign of the ship.
<b>SOURCE</b>	The source for this carrier.
<b>PROVORG</b>	The providing organization code of the source organization for the carrier.
<b>SERVICE</b>	The service code of the source organization of the carrier.
<b>CARRIER TYPE.</b>	The type of carrier.
<b>CONFIGURATION</b>	The configuration of the carrier.
<b>COMMENT</b>	Comments associate with the carrier

**TOTAL MISSION ACL (air)/CAPACITY (land/sea).** The load capacity of the carrier terms of STON/PAX (air and land) or MTON/SQFT/MBBL/PAX (sea).

The following displays only information shown on this screen:

**CARRIER \_\_\_\_ OF \_\_\_\_.** (Top right) If you had selected several carriers, this will indicate to you which carrier out of the total number of carriers you selected.

**TOTAL ALLOCATED.** STONS/PAX (air and land); PAX/MTONS/SQFT/MBBLS (sea). These fields will display the total number of passengers or amount of cargo allocated to this carrier between the onload and offload locations. These fields are dynamically updated as you add or change allocations on this screen.

**CARRIER ONLOAD ARV/DPT.** The first field lists the carrier's onload location code and clear text name in the carrier's itinerary for which this allocation will apply. The adjacent field contains the planned arrive and depart times at the onload location.

**CARRIER OFFLOAD ARV/DPT.** The first field lists the carrier's offload location code and clear text name in the carrier's itinerary for which this allocation applies. The adjacent field contains the planned arrive and depart times at the offload location.

**OPLAN** This is the operation plan that you specified on the Add Group Allocations qualification screen from which requirements were to be retrieved.

**OPLAN C-DAY** This is the designated C-day for this OPLAN, if it has been declared and entered into the database.

**REQMNT ONLOAD/OFFLOAD.** These are the locations in the requirement's preferred routing that correspond to the onload and offload locations used for this allocation. These fields are blank if they are the same as the onload and offload locations for the carrier. You would have identified these on the qualification screen, if applicable.

In the scroll region at the bottom of the screen are the requirements that meet the retrieval criteria specified in the previous Add Group Allocations screen. The requirements are displayed with those requirements already on the carrier at the top of the list (indicated by an asterisk) and followed by all other qualifying requirements sorted by LAD and ULN. This is a scroll region. Only five requirements from the list are displayed at any one time. You can scroll through the list by using the FUNCTION keys at the bottom of the screen or by moving the cursor down the list of requirements with an ARROW key or TAB key. As you ARROW or TAB past the bottom-most requirement, subsequent requirements on the list will move into the display region.

Each requirement that the system retrieved is displayed with the following information:

**RQMNT**            The ULN.

\*            An asterisk in the column after the ULN indicates that this requirement is already allocated to this carrier.

**MOVMT LEG**    The movement leg that corresponds to this allocation onload and offload locations.

**EAD**            The earliest arrival date.

**LAD**            The latest arrival date.

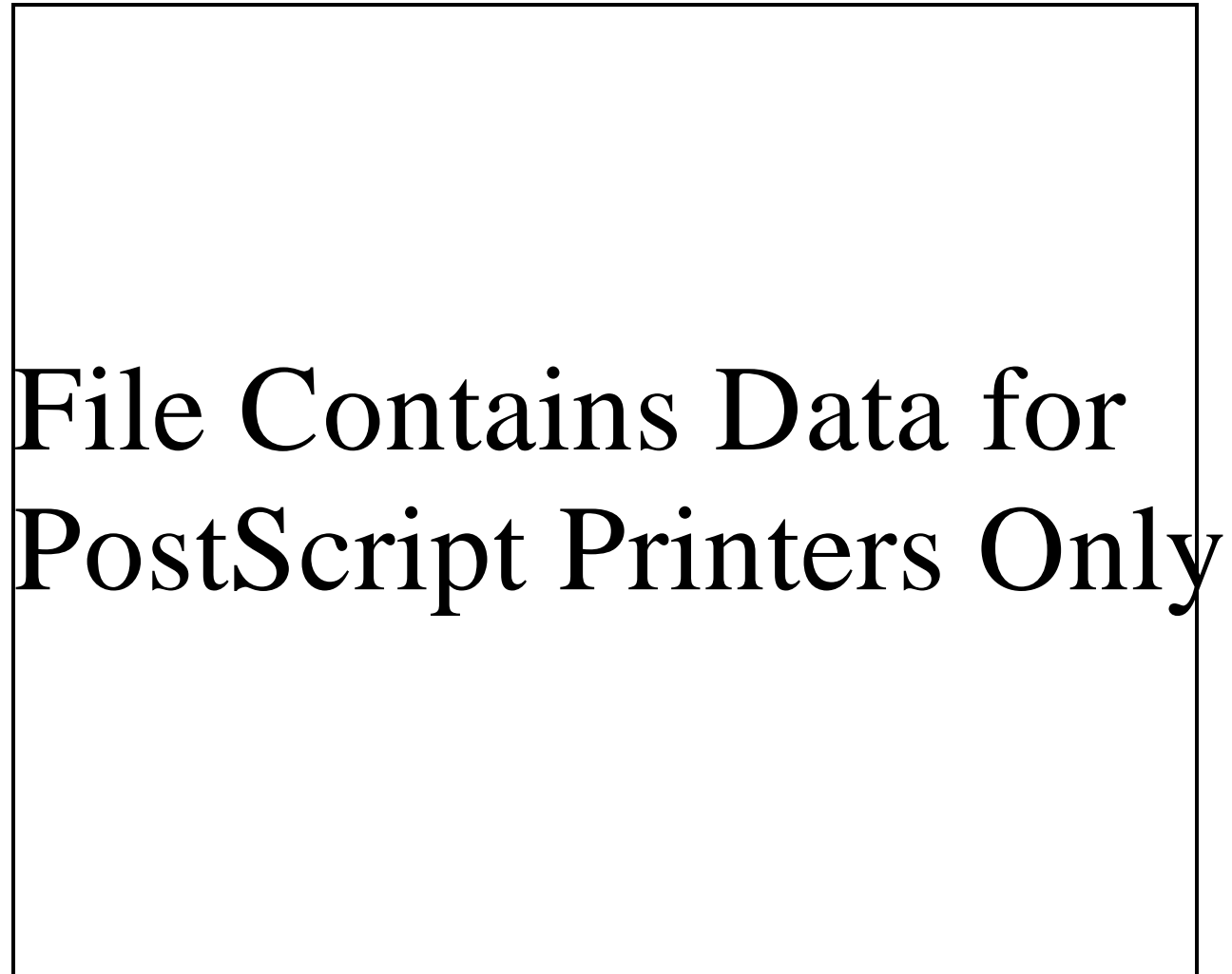
**STONS/PAX** (air and land) **PAX/MTONS/SQFT/MBBLS** (sea). If there is a positive number here, this will be the amount of cargo and number of passengers for this requirements that are not allocated (based on the requirements record). If the requirement is fully allocated, the field(s) will display zeros. If the requirement has been overallocated, the field(s) will display negative numbers corresponding to amount overallocated.

## **ADDING GROUP ALLOCATIONS TO AIR AND LAND CARRIERS**

If you want to designate a requirement on the list to be allocated, select the ACCEPT toggle. The system then adds the total cargo and passenger amounts to the Total Allocated fields for the carrier. You can adjust the quantities added for that requirement by moving to the appropriate STONS or PAX field and making the change. The Total Allocated fields will be changed accordingly.



If you change your mind, you can deselect a requirement by clicking or toggling the ACCEPT off, and the system will redisplay the original cargo and passenger amounts for that requirement.



*Figure 3-42. Add Group Requirement Allocations –Land*

## **ADDING GROUP ALLOCATIONS TO A SEA CARRIER**

Allocating a ship that has both a measurement tonnage capacity and a square footage capacity, you must first indicate which capacity you want to apply the allocation against. To do this, you need to toggle the Default at the right side of the screen. The working default capacity (MTONS or SQFT) will be displayed. You will be able to switch between the two capacity types as you do your allocating.

If you want to select a requirement from the list to be allocated, select the ACCEPT toggle. The system then adds the total cargo and passenger amounts to the Total Allocated fields for the carrier. For the cargo, the system will only add the current default type quantity. You can then adjust the cargo or passenger quantities for that requirement, and the Total Allocated fields will be changed accordingly. If you change your mind, you can deselect a requirement by clicking or toggling the

ACCEPT off, and the system will redisplay the original cargo and passenger amounts for the requirement.

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*Figure 3-43a. Add Group Requirement Allocations - Sea*

### 3.5.2 Add, Review, Modify Allocations

The ADD, REVIEW, MODIFY ALLOCATIONS function allows the user to allocate individual requirements to a specified carrier, to review the current list of requirements allocated to a carrier, or to modify the previously allocated requirements.

#### TO SELECT THIS FUNCTION:

**USING THE MENU:** From the basic menu, select ALLOCATIONS/MANIFESTS with either your mouse or keyboard. You will then be presented a secondary cascaded menu. Select the allocation function that you want to use.

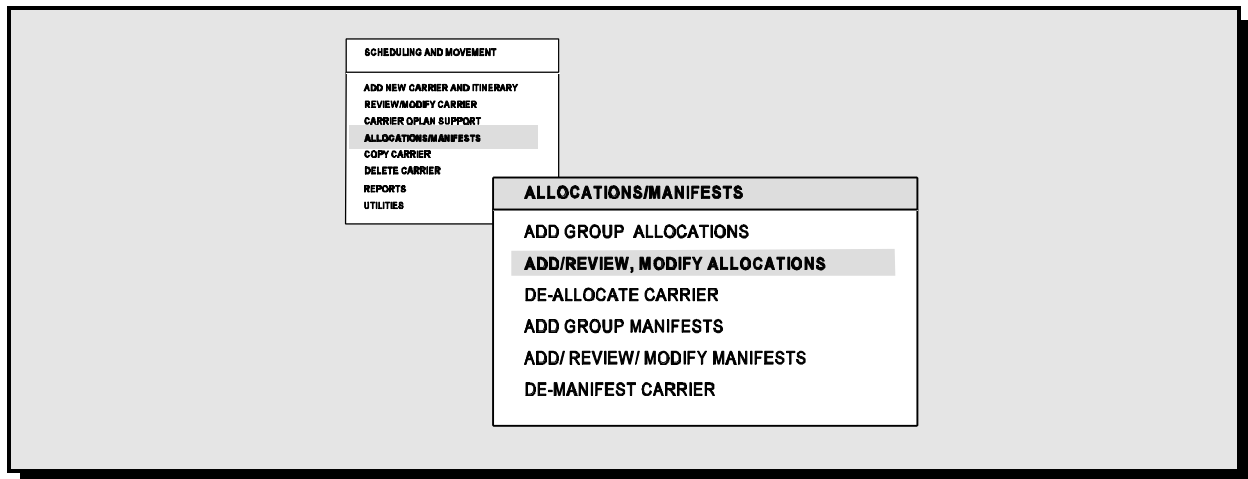


Figure 3-43. Add, Review or Modify Allocations Menu

**USING RAPID NAVIGATION:** On the Command Line screen, enter the four digit code ARMA, to proceed directly to the Add/Review, Modify Allocations qualification screen.

**3.5.2.1 Add/Review, Modify Allocations Qualification.** This qualification screen is used to start the review of allocations or to initiate an allocation action for a single specific carrier. You identify a carrier that you want to work with and other details to indicate what OPLAN and what locations in the carrier's itinerary are to be reviewed or allocated. Once you have selected your options and entered the required information, transmit the screen. The system will present an Add/Review Modify Allocated Requirements By Onload/Offload screen for mode and carrier.



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*Figure 3-44. Add, Review or Modify Allocations Qualification Screen*

**USER INPUT:**

You must identify the carrier and the OPLAN whose requirements you want to review or allocate. You must have both appropriate functional permissions and access permissions to the OPLAN. In addition, the OPLAN must be a supported OPLAN for the carrier.

<b>CARRIER</b>	Enter a valid Carrier ID. The system will prompt you if the carrier does not exist in the database.
<b>OPLAN</b>	Enter a valid PID. You must have permissions to this plan and the carrier must support this OPLAN. [Use field level help to see the OPLAN search pop-up.]

Under Data to Review/Modify you must select one of the following. Toggle the selection of your choosing:

**ALL ALLOCATIONS.** Select this to indicate that you want to review or modify all allocations for the selected carrier.

**BY ONLOAD \_\_\_\_ OR OFFLOAD \_\_\_\_.** Select this to indicate that you want to review or modify all allocations for the selected carriers at either a specific onload or offload location. If you select this option you must enter at least one of the locations. With this option, the system will present only the allocation screens that involve the listed onload or offload. The GEO help is available in the onload/offload fields.

**BY ONLOAD \_\_\_\_ OFFLOAD \_\_\_\_ PAIR.** Select this to indicate that you want to review or modify all allocations for the selected carriers for only a specific onload/offload combination. If you select this option, you must enter both an onload and offload location. With this option, the system will only present the allocation screen that involves both the listed onload and offload. The GEO help is available in the onload/offload fields.

**PLANNED ACTIVITY BY LOCATION \_\_\_\_.** Select this to indicate that you want to see all the planned activity for this carrier at a specific location. If you select this option you must enter one location from the carrier's itinerary. With this option, the system will present you a display-only screen that lists all the carriers activity at that location including onload, offload, and enroute requirements. (See section 3.5.4)

**LEG CODE** If you want to work in a specific movement leg (e.g., POE to POD) for this allocation activity, enter an appropriate LEG code using one of the codes shown on the screen. This will automatically associate this leg with the allocation action and is used to support a feature in which remaining to be allocated quantities are automatically listed on the screen.

When you transmit the screen, the system will present each allocation screen for this carrier that meet the options and location choices you have made.

**3.5.2.2 Add, Review, or Modify Allocated Requirements by Onload/Offload.** The Add, Review or Modify Allocated Requirements By Onload/Offload screen is used to allocate individual requirements to a single onload-offload pair in a specified air carrier. This function can be accessed through two menu paths:

1. From the Add/Review, Modify Allocations qualification screen. If you select any of the first three data option choices, this screen will appear.
2. From the Review or Modify Carrier Display Options. (See Section 3.4.2.2). If you select any

of the allocation options, this screen will appear for each carrier that you are reviewing. The allocation activity follows the Review or Modify Itinerary screen for each carrier if both the Itinerary and an Allocation option are selected for display.



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*Figure 3-45. Add, Review or Modify Allocated Requirements By Onload/Offload - Air*

All Add/Review, Modify Allocated Requirements By Onload/Offload screens are structured similarly. The upper two-thirds of the screen contains basic nonmodifiable carrier information. The screens differ in this area by mode of carrier because the information for each mode has some differences. The lower portion of the screen is a scroll region where the requirements information is displayed. This section of the screen is identical across all three modes, except for the cargo quantity fields.

Based on the mode of the carrier being reviewed, S&M will present you the appropriate screen for the mode of carrier that you identified. The following screens are used in this function:

Air      SM-P03-A      Figure 3-39

Sea	SM-P03-L	Figure 3-40
Land	SM-P03-S	Figure 3-41

The following carrier information fields in this screen are display only and similar to other screens in S&M:

<b>CARRIER</b>	Carrier unique identification.
<b>SHIP NAME</b>	The name of the ship.
<b>IRCS</b>	The IRCS of the ship.
<b>SOURCE</b>	The source for this carrier.
<b>PROVORG</b>	The PROVORG code of the source organization for the carrier.
<b>SERVICE</b>	The service code of the source organization of the carrier.
<b>CARRIER TYPE</b>	The type of carrier.
<b>CONFIGURATION</b>	The configuration of the carrier.

**MISSION ACL (air)/CAPACITY (land/sea).** The load capacity of the carrier in terms of STON/PAX (air and land) or MTON/SQFT/MBBL/PAX (sea).

In this function, you work with a single onload and offload pair at a time. Depending upon the options you selected, you may retrieve one or more of these screens for each carrier. If you have chosen to work with more than one of the carrier's allocation screen (e.g., by selecting All Allocations in the previous qualification screen), the screen will be presented to you in the order in which the locations are sequenced in the itinerary.

The following additional information is shown on this screen:

**TOTAL ALLOCATED.** STONS/PAX (air and land); PAX/MTONS/SQFT/MBBLS (sea). These display field will show the total number of passengers or amount of cargo allocated on this carrier between the onload and offload locations on this screen. These field are dynamically updated as you add or change allocations on this screen.

**OPLAN** This is the operation plan that you specified on the ADD GROUP ALLOCATIONS qualification screen from which requirements were to be retrieved.

**ONLOAD** (LOC, LOC NAME, SCHED ARV/DPT). This line displays the carrier's onload location code, clear text name, and the planned arrive and depart times at the

onload location in the carrier's itinerary for which this allocation will apply.

**OFFLOAD** (LOC, LOC NAME, SCHED ARV/DPT). This line displays the carrier's offload location code, clear text name, and the planned arrive and depart times at the offload location in the carrier's itinerary for which this allocation will apply.

When the screen appears, the onload and offload locations first shown are based on your earlier selections or where you are in a series of carrier allocation screens (if you are working with several onloads and offloads). The location code fields can be used initially to change the screen to a different onload and/or offload pair. Place your cursor focus on the location field you want to change to and enter another valid onload or offload location from the carrier's itinerary. Type in the location code using the format shown on the screen and press your TAB key. If the new

locations are valid in the carrier's itinerary, then the system will refresh the screen and you can continue to work.

The scroll region at the bottom of the screen displays the requirements, if any, that are already allocated for on this carrier for these locations. This is a scroll region and only five requirements from the list are displayed at any one time. You can scroll through the list by using the FUNCTION keys at the bottom of the screen, or by moving the cursor down the list of requirements with an ARROW key or TAB key. As you ARROW or TAB past the bottom-most requirement, subsequent requirements on the list will move into the display region.

Requirements are shown with the following information:

**RQMNT**            The ULN.

**LEG**                The movement leg code that corresponds to this allocation onload and offload locations.

**STONS/PAX** (air and land) **PAX/MTONS/SQFT/MBBLS** (sea). The amount of cargo and number of passengers for this requirement allocated on the carrier.

When the screen first appears, the display at the bottom of the contains the requirements that are currently allocated on this carrier for these locations. In order to manually add or modify the allocation information, you place the focus on the Act (action) field and identify what action you will take.

**To add an allocation:** Type A (for add) in the Act block of a line and press TAB. If you do this on a blank line, all the fields on that line will become active. If you do this on a line that already has allocation data, the screen will move the display down one line from that point and provide you a new blank active line.

**RQMNT**            Type in the ULN that you want to allocate.

**LEG**                If you specified a leg code on the qualification screen, the system will



automatically display that code. Otherwise you must enter the code designating what segment of this ULN's routing you are dealing with. [If necessary, use the field level help to see/select a leg code.]

**STONS/PAX** (air and land) **PAX/MTONS/SQFT/MBBLS** (sea). The system automatically displays the unallocated quantity of cargo and number of passengers for the routing leg of this ULN. You may either change these numbers, if appropriate, or leave them as is. Once you transmit this screen, this requirement will be allocated to this carrier.

**To modify an allocation.** Place the focus on the Act field of the allocation line that you want to change. Enter the correct code and press the TAB key. The following codes are valid:

- M = Modify – This will make all fields on that line active. Move to the field(s), and make the necessary changes.
- D = Delete – This will delete that line from the screen.

Once you transmit the screen, the system updates the database.

## ALLOCATING TO SEA CARRIERS

In allocating a ship that has both a measurement tonnage (MTON) capacity and a square footage (SQFT) capacity, you must first indicate which capacity you want to apply the allocations against. To do this, you need to select Default at the right side of the screen. The working default capacity (MTON or SQFT) will be displayed. You will be able to switch between the two capacity types as you do your allocating on this screen.

Once you have completed allocation to a sea carrier, then proceed with adding or modifying allocations as detailed above. As you work with each requirement you can only add or modify the cargo quantities in default cargo capacity type, either MTON or SQFT.

**? HINT:** Some ULNs may have both bulk cargo and rolling stock that will generally be allocated in MTONs and SQFT, respectively. You can reflect that ULNs allocation in both types of cargo quantities. First allocate that an amount in MTONs (or SQFT) then change the default and allocate an amount against the other capacity.

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*Figure 3-46. Add, Review or Modify Allocated Requirements By Onload/Offload - Sea*



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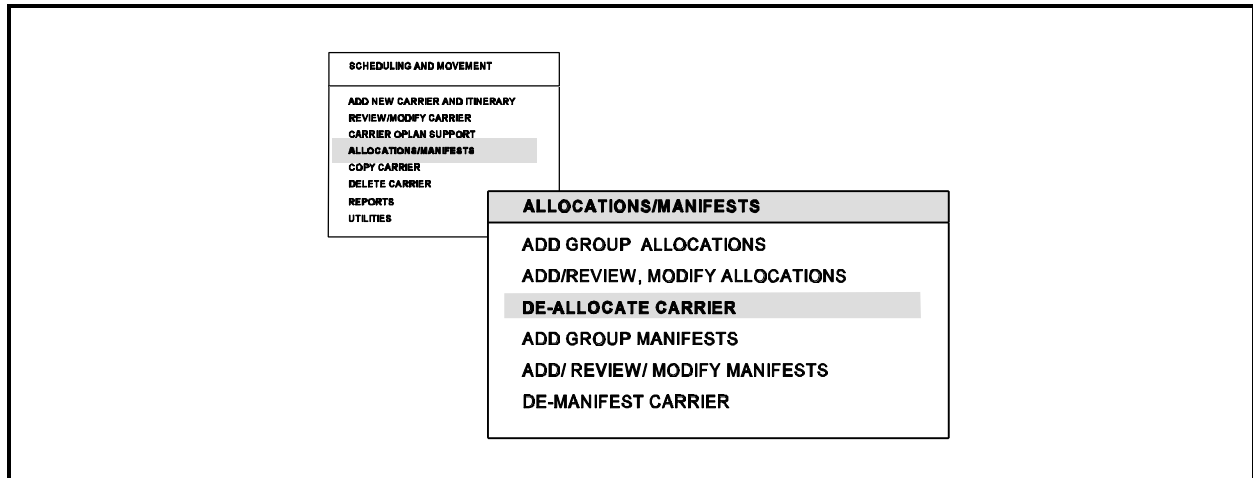
*Figure 3-47. Add, Review or Modify Allocated Requirements By Onload/Offload - Land*

### **3.5.3 Deallocate Carrier**

Users may deallocate individual requirements or a group of requirements from a carrier or group of carriers. Deallocation is the removal of a TPFDD requirement from a carrier. The DE-ALLOCATE CARRIER function allows the user to select requirements to be deleted based on a number of user-selectable criteria. This function allows the user to restrict deallocation by individual carrier; by individual carrier supporting a given OPLAN; by individual carrier supporting a given OPLAN and restricted to selected requirements; and by OPLAN and requirement across all carriers.

#### **TO SELECT THIS FUNCTION:**

**USING THE MENU:** From the basic menu, select ALLOCATIONS/MANIFESTS with either your mouse or keyboard. You will then be presented a secondary cascaded menu. Select the allocation function that you want to use.



*Figure 3-48. Deallocate Carrier Menu*

**USING RAPID NAVIGATION:** On the Command line screen, enter the four digit code DALC, to proceed directly to the DE-ALLOCATE CARRIER qualification screen.

**3.5.3.1 De-Allocate Carrier Qualification.** The DE-ALLOCATE CARRIER screen (Fig 3-49) is the basic screen you use to identify what is to be deallocated.

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*Figure 3-49. Deallocate Carrier Qualification*

The Deallocate Carrier screen allows the user to select requirements to be deallocated based on a number of user-selectable criteria. This screen allows you to deallocate one of four ways:

- (1) all requirements on an individual carrier
- (2) all requirements from a single OPLAN on an individual carrier
- (3) selected requirements from a specific OPLAN on an individual carrier
- (4) selected requirements from a specific OPLAN across all carriers

The transmission of this screen will not immediately deallocate requirements you specified. Rather, after you have selected/entered data in the desired fields and have transmitted, the Carrier Deallocate Confirmation screen will be displayed to provide you the option of confirming the deallocation.

## USER INPUT

The following are the deallocate options. Use the selection toggle to the right of the screen. Use your mouse or keyboard to toggle on the selection of your choice.

**DEALLOCATE CARRIER.** This selection will deallocate a single carrier and all requirements allocated to a carrier. Provide the following information:

**CARRIER**      Enter the Carrier ID that you want to deallocate.

**DEALLOCATE OPLAN.** This selection will deallocate all requirements from a specified OPLAN for a specified carrier. Provide the following information:

**OPLAN**      Enter the OPLAN whose requirements will be deallocated from the carrier identified in the adjacent field.

**CARRIER**      Enter the Carrier ID that you want to deallocate.

**DEALLOCATE REQUIREMENTS FROM CARRIER.** This selection will deallocate specific selected requirements from a single OPLAN from a single carrier. Provide the following information:

**CARRIER**      Enter the Carrier ID that you want to deallocate.

**OPLAN**      Enter the OPLAN whose requirements will be deallocated.

**ULN**      Enter up to eight individual ULNs to be deallocated.

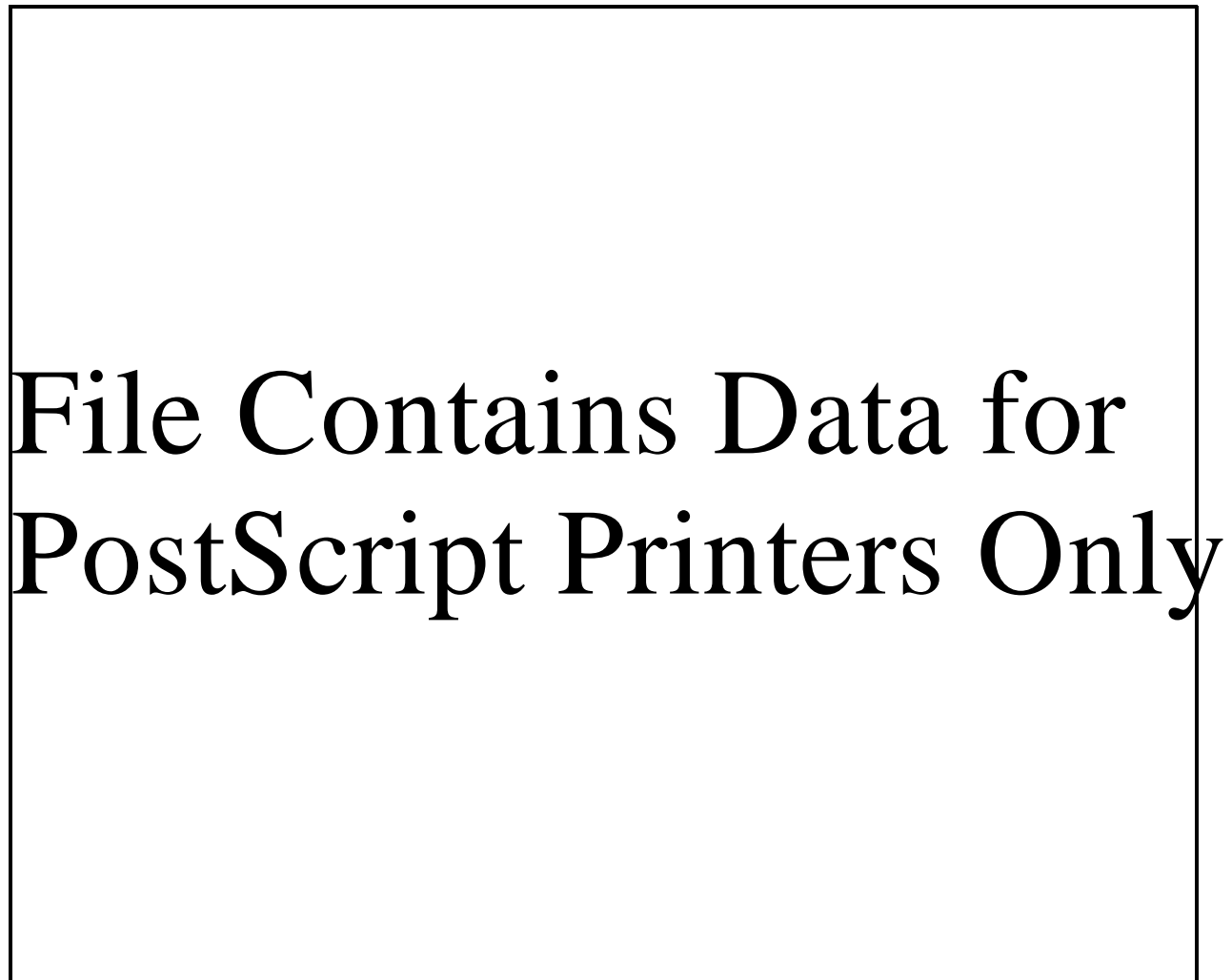
**DEALLOCATE REQUIREMENTS ACROSS ALL CARRIERS.** This selection will deallocate specific selected requirements across all carriers by OPLAN and requirement number. Provide the following information:

**OPLAN** Enter the OPLAN whose requirements will be deallocated.

**REQUIREMENT.** Enter up to eight individual ULNs to be deallocated.

When you transmit the screen, you will be presented a Carrier Deallocate Confirmation screen.

**3.5.3.2 Carrier Deallocate Confirmation.** The Carrier Deallocate Confirmation screen is displayed as a result of transmitting the Deallocate Carrier screen. This screen displays the total number of requirements that will be deallocated based on the criteria you specified in the Deallocate Carrier screen.



*Figure 3-50. Deallocate Carrier Confirmation*

The field, YOU ARE ABOUT TO DELETE THE FOLLOWING NUMBER OF ALLOCATIONS will display the requirements that will be deallocated.

**USER INPUT**

**To cancel the deallocation.** You can cancel the deallocation action by transmitting this screen without confirming the action . Press your ENTER key or click on the TRANSMIT field. When you do this, the DEALLOCATE CARRIER screen will be redisplayed with all your previous entries/selections shown. You may then change your selections and restart the deallocation function or exit the function.

**To confirm the deallocation.** If you want to confirm the deallocation action, you must enter a C in the field, "TO CONFIRM THE DELETE PROCESS, ENTER C and then transmit.

## **BUSINESS RULES**

1. The user must have OPLAN permissions to those OPLANs whose requirements are being deallocated and must have appropriate functional permissions.
2. Deallocation actions will also update schedule and status flags in the requirement's record.

### 3.5.4 Review Planned Activity by Location

The Review Planned Activity By Location screens provides a view of all the movement and allocation activity for one carrier at one location. You access this function as an option choice off the ADD/REVIEW, MODIFY ALLOCATION qualification screen.

All Add/Review, Modify Allocated Requirements By Onload/Offload screens are structured similarly. The upper half of the screen contains basic carrier information. The screens differ in this area by mode of carrier because the information for each mode has some differences. The lower portion of the screen displays the itinerary location and times and all the allocation arriving or departing on this carrier at that location. This section of the screen is identical across all three modes except for the cargo quantity fields.



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*Figure 3-51. Review Planned Activity By Location*



Based on the mode of the carrier being reviewed, S&M will present you the appropriate screen for the mode of carrier that you identified. The following screens are used in this function:

SM-P04-A	Figure 3-51
SM-P04-L	[Not included. The format is the same as Figure 3-51]
SM-P04-S	[Not included. The format is the same as Figure 3-51]

The following carrier fields in this screen are displayed at the top of the screen.

<b>CARRIER</b>	Carrier unique identification.
<b>SHIP NAME</b>	The name of the ship.
<b>IRCS</b>	The IRCS of the ship.
<b>SOURCE</b>	The source for this carrier.
<b>PROVORG</b>	The PROVORG code of the source organization for the carrier.
<b>SERVICE</b>	The service code of the source organization of the carrier.
<b>CARRIER TYPE</b>	The type of carrier.
<b>CONFIGURATION</b>	The configuration of the carrier.
<b>MISSION ACL (air)/CAPACITY (land/sea).</b>	The load capacity of the carrier in terms of STON/PAX (air and land) or MTON/SQFT/MBBL/PAX (sea).

The next line shows the specific location that is being displayed, as well as the scheduled arrive and depart times for this carrier at that location.

**ALLOCATED REQUIREMENT ACTIVITY AT.** The location code and clear text name of the itinerary stop.

<b>ARRIVE</b>	The planned arrival time at this location.
<b>DEPART</b>	The planned departure time from this location.

The display at the bottom of the screen contains all the requirements that are planned for this carrier at this location. The requirements are shown by type of activity and then in alphabetic order. This is a scroll region and only five requirements from the list are displayed at any one time. You can scroll through the list by using the Row block at the top of the screen. The total number of requirements for this carrier are shown in the "of" block. The Row block tells you which of the total requirements is shown at the top of the list. You can scroll through the list of requirements by changing

the number in the Row block and pressing the TAB key. The system will present the selected row at the top of the list.

For each requirement, the display shows the type of activity associated with that requirement at the location, the OPLAN for the requirement, the planned onload and offload locations, and amount of cargo and number of passengers.

**ACTIVITY** This is what is planned to occur at the location specified (i.e., onload, offload, or in transit.)

**OPLAN** The PID of the requirement listed on this row.

**RQMNT** The ULN for the requirement.

**STONS/MTONS/SQFT/MBBLS.** The allocated amount of cargo for that ULN. Only the cargo types appropriate for the mode are shown.

**PAX** The allocated number of passengers for that ULN.

The quantities are summarized at the bottom of the screen showing the total cargo and passengers planned to be offloaded and unloaded for that carrier at that stop, and the total planned to depart on that carrier from that stop.

## BUSINESS RULES

1. The user must have OPLAN permissions to see the requirements. The user will see only the information appropriate for the permissions.
2. Deallocation actions will also update schedule and status flags in the requirement's record.